

A Proponent's Guide

for

Developing an IT Investment Proposal

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Appendix 1: Project Proponent's Guide for Developing an IT investment proposal

Reference Documentation:

The Managed Evolutionary Development Guidebook: Process Description and Application

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1.0 Purpose

The System Coordination Office (SCO), WO-570, has adopted guidelines and templates for developing IT investment proposals, business cases, and other life cycle deliverables. These guidelines will be used by individuals responsible for leading the development of an IT investment proposal.

This guide is part of the overall project management “best management practices” that have been developed by the SCO.

This document identifies the requirements for developing an IT investment proposal. Completed IT investment proposals are to be submitted to the SCO; the SCO staff are available to work with proponents to assist in developing this document.

2.0 Applicability

These guidelines apply to all IT investment proposals.

3.0 Management Objectives

The objectives of these guidelines are to describe and establish a standardized and repeatable process for developing IT investment proposals.

Once an IT investment proposal is approved by BLM’s Information Technology Investment Board (ITIB), these guidelines will provide project managers with uniform guidance, requirements, and specific instructions for developing business cases and project planning documents. These guidelines will change as experience is gained and the SCO project management guidelines undergo continuous improvement.

Project planning is necessary if proponents are to develop and implement successful systems. The level of effort to document objectives, requirements, scope, and implementation strategy, however, needs to be carefully weighed against performing the actual work to develop and implement the system.

4.0 Standardized Guidelines for Project Managers

4.1 Background Information

The SCO has reviewed the Bureau’s current draft of the Life Cycle Management guidelines, and has also reviewed and used the Managed Evolutionary Development (MED) process model. Based on experience, funding and staffing level, the SCO has determined that a modified approach to the project planning

process is necessary.

The reasons behind developing a modified approach to project planning is that the Bureau:

- ☞ is faced with trying to develop projects within a rapidly evolving environment
- ☞ is often uncertain about the scope and requirements of the proposed projects
- ☞ is faced with the need to proceed to meet business requirements
- ☞ needs to better incorporate risk management into system development
- ☞ needs to demonstrate an orderly planning and decision process

The SCO staff will work with each Proponent/Project Manager to develop and maintain all project documents. All projects will use the standardized project document template.

4.2 Standardized Guidelines

The benefits of standardized project documents are numerous.

- ☞ Decision makers, sponsors, and users can easily find the same information in the same place when comparing two different projects.
- ☞ A standardized format helps to ensure consistent communication and analysis.

5.0 Roles and Responsibilities

Proponent – Is responsible for coordinating and championing the development of the IT investment proposal. Once the IT investment proposal has been approved by the ITIB, the proponent may shift roles to the Business Process Owner, Project Manager, or Project Team member.

Assistant Director's IRM Advisor – Is responsible for serving as the Assistant Director's primary point of contact for issues concerning the IT investment proposal.

Business Process Owner (BPO) – Is responsible for ensuring that the business processes under development or enhancement are re-engineered prior to being automated.

Project Manager (PM) – Is responsible for the successful management and completion of one or more projects approved by the ITIB. A trained Project

Manager should be assigned once the ITIB has approved the IT investment proposal. It is the Project Manager's responsibility to develop all project planning documents and bring the project to a successful implementation.

System Coordination Office (SCO) - Is responsible for screening all IT investment proposals to ensure they are in line with the Bureau's selection, control, and evaluation criteria. Ensures that IT investment proposals and business cases are consistent with the Bureau Architecture and facilitates the maintenance of the Bureau Architecture. Monitors project performance (cost, schedule, scope) during the Control phase. Maintains the Bureau's IT Clearinghouse and Metadata Repository and coordinates the development of Project Management.

IT Investment Board (ITIB) - Is the governing board for executive input, recommendations, and decisions on Bureauwide Information Technology (IT) investments and provides support to the Director, Deputy Directors, and Assistant Director for Information Resources Management. The ITIB serves as the capital planning board for selecting, controlling, managing, and evaluating information systems (software) and technology (hardware) investments.

Sponsor - A Field, Center, or Washington Office manager who authorizes the development of an IT investment proposal and/or business case. Once the IT investment proposal has been approved by the ITIB, it is the Sponsor's responsibility to assign a trained/qualified project manager, and funding and project codes for developing a business case. The Project Sponsor shifts roles to become the System Owner when a business case has been approved by the ITIB.

System Owner - Responsible for selecting a Project Manager, approving all documentation and business requirements, acceptance, training, and maintenance.